



April 20, 2017

To: Legislative and Communications Committee
From: Darrell Johnson, Chief Executive Officer
Subject: Agreement for Public Awareness Campaign Services for the OC Streetcar Project

Overview

Consultant services are needed to support development and implementation of a public awareness campaign during the pre-construction and construction phases of the OC Streetcar project. Proposals have been received and evaluated in accordance with the Orange County Transportation Authority's procurement procedures for technical and professional services. Approval is requested to execute a new agreement for these outreach services.

Recommendations

- A. Approve the selection of Katz and Associates as the firm to provide community outreach services for the pre-construction and construction phases of the OC Streetcar project.
- B. Authorize the Chief Executive Officer to negotiate and execute Agreement No. C-6-1526 between the Orange County Transportation Authority and Katz and Associates, in the amount of \$1,151,712, to provide community outreach services for a public awareness campaign for the OC Streetcar project for a four-year initial term with a one-year option term.

Discussion

The Orange County Transportation Authority (OCTA), in cooperation with the Federal Transit Administration (FTA), is pursuing a modern streetcar line that will connect the Santa Ana Regional Transportation Center to a new transportation hub located near the intersection of Harbor Boulevard and Westminster Avenue in the City of Garden Grove, traveling along Santa Ana Boulevard and Fourth Street in the City of Santa Ana and the Pacific Electric Right-of-Way.

The OC Streetcar has entered the engineering phase of the FTA's New Starts process with a goal of securing a full-funding grant agreement as identified in the funding plan for the OC Streetcar project (Project), and construction is anticipated to begin in Spring 2018. As identified in the FTA submittals and in line with OCTA's own proactive approach to public awareness during the pre-construction and construction phases of the Project, it is important to provide the public with ongoing and frequent contact to ensure the community is aware of activities that will affect them.

Consultant services will aid OCTA's efforts to develop and deliver communication on a day-to-day basis to advance public information messages about construction activities to a broad audience as OCTA implements the community awareness goals established in FTA submittals. The efforts during the pre-construction phase of the public awareness campaign will have the associated benefit of establishing communication preferences and issue identification, as well as notification of utility relocation activities.

The alignment spans several distinct districts, including business districts within the Cities of Santa Ana and Garden Grove. Comprehensive outreach tactics will be implemented to address the specific needs of the business and residential stakeholders. As an example, it is important to work closely with the Santa Ana Unified School District to convey construction safety messages and to monitor the construction activities with the contractor and construction management team.

The current outreach activities include meetings with residential and business interests throughout the Project area to build awareness and inform the community that the Project is advancing and meeting its commitments to the FTA. Once construction activities begin in 2018, these community relationships will serve as an important resource for ongoing day-to-day contact with stakeholders along the alignment, as well as the traveling public, which will rely on OCTA's efforts to safely and efficiently move them through the affected areas to their homes and businesses.

This approach of supplementing OCTA staff efforts with consultant services is consistent with the project outreach support functions for all other capital projects in OCTA's portfolio.

Procurement Approach

This procurement was handled in accordance with OCTA's Board of Directors (Board) approved procedures for professional and technical services. Various factors are considered in an award for professional and technical services.

Award is recommended to the firm offering the most comprehensive overall proposal, considering such factors as staffing and project organization, prior experience with similar projects, work plan, as well as cost and price.

On December 12, 2016, the Board approved the evaluation criteria and weightings to procure public outreach consultant services for the Project and Request for Proposals (RFP) 6-1526 was issued electronically on CAMM NET. The Project was advertised in a newspaper of general circulation on December 12 and 19, 2016. A pre-proposal conference was held on December 20, 2016, with ten attendees representing nine firms. Three addenda were issued to provide a copy of the pre-proposal registration sheet and presentation, as well as to respond to questions and to handle administrative issues related to the RFP.

On January 17, 2017, six proposals were received. An evaluation committee consisting of OCTA staff from Contracts Administration and Materials Management, Rail Programs and Facilities Engineering, and Capital Projects Outreach departments, as well as external representatives from the City of Santa Ana, the City of Garden Grove, and Transportation Corridor Agencies met to review all proposals received. The proposals were evaluated based on the following Board-approved evaluation criteria and weights:

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|-------------------------------------|------------|
| • Qualifications of the Firm | 25 percent |
| • Staffing and Project Organization | 25 percent |
| • Work Plan | 30 percent |
| • Cost and Price | 20 percent |

Several factors were considered in developing the criteria weights. Work plan was weighted the highest at 30 percent to emphasize the importance of the project team's understanding of the project scope, its challenges, level of effort, as well as the recommended outreach approach and strategies. Qualifications of the firm, as well as staffing and project organization, were weighted equally at 25 percent. The proposing firm needed to demonstrate direct public outreach experience developing and implementing community outreach programs for transportation projects during pre-construction and construction phases. In addition, the proposing firm must demonstrate an experienced, well-rounded team with a blend of senior and junior level staff having adequate availability. Cost and price was weighted at 20 percent to ensure delivery of a cost-effective public awareness campaign.

The evaluation committee utilized a best-value selection process for this RFP. The best-value determination is based on a 100-point scale. The RFP required proposing firms to submit a separate price proposal in a sealed package. In

order to focus on the technical aspects of the proposals, the evaluation committee first evaluated the written proposals on technical merit based on the weighted criteria for qualifications of the firm, staffing and project organization, as well as work plan, which represented a maximum of 80 points of the total proposal score. Once a short-list of top-ranked firms within a competitive range was developed based on the technical scores of the proposals, the sealed price proposals were opened only for the short-listed firms. The pricing score represented a maximum of 20 points of the total proposal score.

On February 6, 2017, the evaluation committee reviewed the six proposals based only on the technical evaluation criteria and short-listed the two most qualified firms listed below in alphabetical order:

Firm and Location

Barrantes Enterprises Inc. doing business as The Sierra Group (TSG)
Whittier, California

Katz and Associates (Katz)
San Diego, California

On February 16, 2017, the evaluation committee conducted interviews with the two short-listed firms. The interviews included presentations by the firms to demonstrate their understanding of OCTA's requirements for the Project. In addition, each project team was requested to describe their approach to integrate and allocate the tasks among the proposed team members. The firms' project managers and key team members had an opportunity to present their qualifications and respond to the evaluation committee's questions. Questions were asked relative to the firms' experience in creating public awareness campaigns for multilingual audiences and lessons learned from recent projects that most closely resembled this Project. In addition, the firms were asked to describe the criteria to be utilized to measure the effectiveness or success of the outreach efforts. Finally, each team was asked specific clarifying questions related to their proposal.

After considering the presentations and responses to the questions asked during the interviews, the evaluation committee reviewed the preliminary ranking and made adjustments to individual technical scores. The sealed price proposals from the two short-listed firms were also opened and scored; however, the ranking of the firms did not change.

Based on the evaluation of the written technical proposals, the information obtained from the interviews, and the price proposals, the evaluation committee

recommends Katz for consideration of the award. The following is a brief summary of the proposal evaluation results.

Qualifications of the Firm

Both firms demonstrated experience developing and implementing comprehensive public outreach programs for various phases of major infrastructure improvement projects throughout Southern California.

Katz has more than 30 years of experience providing outreach efforts, communication, and public involvement support for large-scale infrastructure projects for various public agencies. Katz has implemented public awareness campaigns during pre-construction and construction phases for two major light rail projects in San Diego, including the \$660 million Trolley Renewal Project for the San Diego Association of Governments and the San Diego Metropolitan Transit System, which involved trolley track, substation and grade crossing construction, as well as several upgrades to the station amenities. The other major light rail project was the \$2 billion Mid-Coast Trolley Project, which extended trolley service from downtown San Diego to the University of California San Diego. In addition, Katz developed and implemented a public awareness campaign for OCTA's Rail Safety Education Program and Railroad Crossing Safety Enhancement Program. Furthermore, Katz's proposed subcontractor, Westbound Communications, has extensive experience providing public outreach services for various OCTA improvement projects, including the 91 Express Lanes Rehabilitation Project, Active Transportation Safety Program, Interstate 605/Katella Interchange Project, and the State Route 91 Improvement Project, as well as Passenger Rail Project for the San Bernardino Associated Governments.

TSG is a full-service public relations firm with 23 years of experience providing public engagement and community outreach services for a wide range of transportation projects, including the Exposition Light Rail Line for Exposition Rail Construction Authority, and the Gold Line Station and Aerial Guideway for the Gold Line Construction Authority in Los Angeles. In addition, TSG's proposed subcontractor, CALTROP Communications, has extensive experience providing public outreach services for large-scale construction projects, including the West County Connectors for OCTA and the Interstate 5 On-Call Public Awareness Campaign for the California Department of Transportation.

Staffing and Project Organization

Both firms proposed project teams with experience in delivering community outreach programs on various transportation-related projects. Each team

proposed several dedicated community liaisons with bilingual and/or multilingual capabilities to engage, inform, and involve diverse communities in the Project area. The project team members from each firm clearly demonstrated familiarity with the Project corridor.

Katz proposed several experienced project team members to perform a wide range of activities needed to deliver a comprehensive public awareness campaign. The proposed project team demonstrated extensive experience working with a diverse range of community leaders and organizations, municipalities, agencies, stakeholders, and other community groups. Most of the project team members are bilingual/multilingual. Katz's proposed project manager has six years of relevant experience delivering various outreach campaigns for light rail projects during pre-construction and construction phases.

TSG proposed a well-balanced bench of experienced staff with excellent availability to deliver a comprehensive public awareness campaign. The proposed project manager has over 30 years of experience developing and implementing comprehensive public outreach programs for several rail construction projects. In addition, TSG proposed a team of experienced bilingual community liaisons, including individuals with more than 20 years of industry experience. TSG clearly described the benefits and the need for multiple individuals to fulfill the community liaison role based on targeted outreach efforts tailored to specific audiences.

Work Plan

Both firms demonstrated a deep understanding of the Project's needs and complexity through their discussion of potential issues and mitigation solutions. Each firm proposed a variety of outreach tactics to communicate effectively with the diverse target audiences, including traditional social media approach, open houses, project website, community meetings/events, collateral materials, and information line.

Katz clearly demonstrated a thorough understanding through their strategic and innovative approach of executing a successful public engagement plan to diverse communities surrounding the Project area. Their work plan introduced a variety of creative new ideas to enhance public outreach abilities. The most notable was their proposed OC Streetcar mobile app, which would include a real-time Google Map display with graphics and color-coded pins to show activity, as well as the capability to broadcast text messages for immediate alerts.

TSG also focused on communication strategies and tactics for diverse communities to achieve the most effective outreach engagement plan. In addition, their interview clearly demonstrated their familiarity with the Project area; however, their proposed work plan did not demonstrate a complete comprehension of this Project based on their lower level of effort as reflected by the proposed estimated project hours.

Cost and Price

Pricing scores were based on a formula which assigns the highest score to the firm with the lowest weighted average hourly rate, and scores the other proposal's weighted average hourly rates based on their relation to the lowest weighted average hourly rate. Both firms proposed competitive weighted average hourly rates.

Procurement Summary

Based on the evaluation of the written proposals, the firms' qualifications, and the information obtained from the interviews, the evaluation committee recommends the selection of Katz as the top-ranked firm to provide community outreach for the Project. Katz's significant communications and outreach experience for rail projects, along with its demonstrated in-depth knowledge of the OC Streetcar issues, will help ensure OCTA delivers an effective public outreach campaign for the Project. Evaluators also concurred the firm's established relationships with numerous local communities within the Project area, experienced project team, and technically comprehensive work plan were vital factors in recommending Katz as the consultant team to assist OCTA in delivering a successful comprehensive public outreach program for the OC Streetcar project. Katz delivered a comprehensive proposal and an interview that was responsive to all requirements of the RFP.

Fiscal Impact

The project was approved in OCTA's Fiscal Year 2016/17 Budget, Capital Programs Division, Account 0051-7519-TS010-Z82, and is funded through OCTA's Federal Transit Administration Section 5307 grant CA-90-Y860.

Summary

Based on the information provided, staff recommends the Board authorize the Chief Executive Officer to negotiate and execute Agreement No. C-6-1526 between the Orange County Transportation Authority and Katz and Associates, in the amount of \$1,151,712, to provide community outreach services for a public

awareness campaign for the OC Streetcar project for a four-year initial term with a one-year option term.

Attachments

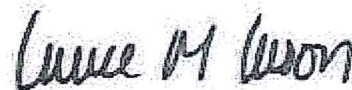
- A. Review of Proposals, RFP 6-1526 Public Awareness Services for OC Streetcar
- B. Proposal Evaluation Criteria Matrix (Short-listed Firms), RFP 6-1526 Public Awareness Services for OC Streetcar
- C. Contract History for the Past Two Years, RFP 6-1526 Public Awareness Services for OC Streetcar

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